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World Production and Trade

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Foreign
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Service

Washington, D.C. 20250

Weekly
Roundup

WR 17-87

April 29, 1987

USDA
JUN 3 1987
CURRENT SERIAL RECORDS

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade.

GRAIN AND FEED

U.S. Rice Sale To ALGERIA Largest Ever. The United States recently made its largest rice sale there: 12,000 metric tons of long grain #2-4 percent broken rice under the GSM-102 program. Representatives of the Algerian national grain agency recently visited the United States and were able to see at first-hand the high quality of U.S. rice and the competitiveness of U.S. prices. Traditionally, Thailand has supplied the bulk of Algeria's 20,000 to 25,000 metric tons of rice imports, while the United States has made only small shipments.

SOVIET Plantings Lag Last Year. As of April 6, a total of 2.3 million hectares of all spring crops had been seeded in the USSR. Of this, 1.1 million hectares were small grains and pulses. In 1986, a year when spring was early, 5.0 million hectares of small grains and pulses had been seeded as of April 7. As of a corresponding date in 1985, the figure was 1.8 million hectares.

Soviet spring planting as of April 6 was included in the quarterly plan fulfillment report published April 24 in Pravda. Typically, spring seeding progress is announced weekly by the Soviets during the season, but this year, perhaps because of the lateness of the season in European USSR, the weekly reports have not begun.

Spring is at least 2 weeks late this year in European USSR, consequently it is likely that the spring seeding figure is largely attributable to work carried out in Soviet central Asia, an area relatively unimportant for grains.

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SOVIET UNION Announces 1986 Yield and Production Data. Yield and production data for the 1986 Soviet crops were published by the USSR in the April issue of its statistical journal, Vestnik Statistiki. Those figures, as reported by the U.S. agricultural attache in Moscow, are:

<u>Crop</u>	<u>Yield</u> (mt per hectare)	<u>Production</u> (1,000 mt)
Total grain	1.80	210,068
Winter wheat	2.80	46,528
Spring wheat	1.43	45,778
Winter rye	1.76	15,248
Winter barley	2.95	4,166
Spring barley	1.74	49,723
Oats	1.66	21,929
Corn	2.95	12,479
Millet	0.95	2,368
Buckwheat	0.63	1,009
Pulses	1.17	7,900
Rice	4.24	2,633
Cotton, raw	2.37	8,233
Fine staple	2.39	1,191
Sugar beets, industrial	23.30	79,299
Tobacco, excl. makhorka	1.94	321
Total Oilseeds	1.19	6,228
Sunflowerseed	1.36	5,258
Soybean	0.94	703
Rapeseed (winter & spring)	0.76	110
Potatoes	13.7	87,186
Vegetables	16.4	29,740
Corn for silage and green chop	17.7	316,540

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In its analysis of the 1986 Soviet grain harvest, USDA aggregated the individual crop data into the usual categories which are:

<u>Crop</u>	<u>Yield</u> (mt per hectare)	<u>Production</u> (1,000 mt)
Wheat	1.90	92,306
Coarse grains	1.81	105,913
Miscellaneous grains	1.25	11,849
Total	1.80	210,068

<u>Crop</u>	<u>Yield</u> (mt per hectare)	<u>Production</u> (1,000 mt)
Winter grains	2.47	65,942
Spring grains	1.60	144,126
Total	1.80	210,068

DAIRY, LIVESTOCK AND POULTRY

EUROPEAN COMMUNITY Cattle Numbers Falling While Sheep Numbers Are Up. Cattle numbers in the EC (excluding Spain and Portugal) fell 2.4 percent during 1986 to 75.6 million head according to the EC statistical office. December 1986 cow numbers were down 1.5 percent to 29.8 million head with most of the decline due to a 1.9 percent drop in dairy cow numbers. Heifers over 2 years old were down 9.0 percent, and 1 to 2 year olds were down 5.6 percent. The decline is a result of the EC dairy reduction program.

EC sheep numbers were up 4.7 percent to 64.7 million head with ewes up 2.6 percent to 45.7 million. Flocks increased in all EC countries except France where they were down 2 percent to 10.6 million head.

EC Poultry Meat Exports Continue To Decline. In 1986, exports of poultry meat from the European Community (EC) to third countries edged down slightly, continuing its downward trend that began in 1982. EC exports totaled 334,000 tons during 1986. EC exports of whole chickens decreased by 23,000 tons, more than any other poultry export category; the EC Commission blames most of this drop on subsidized U.S. exports under the Export Enhancement Program (EEP) to Egypt and the Middle East. The decrease in EC exports to North Africa and the Middle East was partially offset by a large sale of 25,000 tons to the USSR.

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The EC is reportedly looking to develop new markets in East Asia and Africa, as a result of more U.S competition into Egypt and the Middle East. Exports by France, by far the leading EC poultry exporter, to third countries dropped to 207,000 tons last year from 215,000 the previous year, while France's intra-EC sales rose to 66,000 tons from 37,000 tons the preceding year. Reports indicate that, in order to make export sales, French producers are increasingly targeting sales at markets within the EC, especially the United Kingdom and West Germany.

EC consumption of poultry meat continues to rise about 2 to 3 percent annually. Per capita consumption of poultry meat is placed at about 15 kilograms per person, which is still only about half U.S. per capita levels. However, EC per capita consumption is expected to continue to rise inasmuch as more production is being channeled into domestic, rather than export markets.

NEW ZEALAND Dairy Output Cut by Dry Weather. Milk production in New Zealand is expected to decline 13 percent in the dairy year ending May 31, 1987, according to the U.S agricultural attache in Wellington. Most of the decline is due to the widespread dry weather in the dairy regions which had a severe impact on grazing conditions during most of the year. In addition, several government programs were activated early in the year in an attempt to limit further production increases. Along with the reduction in milk production, dry weather has also negatively affected the fat content of the milk. As a result, total milkfat production is expected to be down 14 percent.

Reflecting the decline in milkfat output, butter production in 1986/87 is expected to be 250,000 tons, 17 percent below 1985/86. The decline in butter is more than that of milk production because relatively more milk is being used for production of full-fat milk powder and cheese. With lower butter production and larger exports, particularly butteroil to Brazil, butter stocks at the end of the season are expected to be down sharply. Cheese production in 1986/87 is forecast at 110,000 tons, 6 percent below year-earlier levels. Output of nonfat dry milk is expected to fall to 185,000 tons, 17 percent below last year. Casein output is expected to about 73,000 tons, slightly below last year's level.

TOBACCO

JAPAN Liberalizes Its Tobacco Trade. Lower tariffs on imports of U.S. cigarettes went into effect in Japan April 1, 1987. The tariff cuts are the result of the recent Section 301 settlement.

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Other points of contention between the two countries--unequal excise tax treatment between domestic and foreign importing cigarette firms, as well as the cumbersome application procedures for approval of fixed price revisions, have also been rectified. However, Japanese legislators have passed a resolution urging the government to take "appropriate actions" in the case of a "serious impact" from the anticipated escalation of competition from foreign cigarette imports. The resolution reflects the dissatisfaction among Japanese tobacco producers with the trade settlement. Presently, there are no specific measures outlined to roll-back the elements of the 301 settlement. U.S. cigarette exports to Japan in 1986 were 9.64 billion pieces amounting to US\$127.9 million.

COCOA

COTE D'IVOIRE Cocoa Crop Forecast At Record High. The 1986/87 cocoa crop in Cote d'Ivoire (The Ivory Coast) is expected to reach a new record level of 590,000 tons, according to the U.S. agricultural attache in Abidjan. Increases in both yields and area are contributing to the higher output. While below-average rainfall, particularly during last July and August, initially dimmed this year's crop outlook, favorable rains since September boosted mid-crop production prospects and better than expected yields from young trees also contributed to higher outturn. The previous record for Cote D'Ivoire was set in 1985/86 when production totaled 580,000 tons.

U.S AGRICULTURAL TRADE

Export volume for February 1987 totaled 10.2 million tons, up slightly from the 10.1 million tons exported during February 1986 and 872,000 tons above January's revised figure. Agricultural export value during February 1987 totaled \$2.2 billion, down \$245 million (10 percent) from February 1986, but up \$55.7 million from the previous month's revised figure.

Cumulative U.S. agricultural exports during October-February 1987 totaled \$11.9 billion, down \$876.9 million (7 percent) from the same period a year earlier. Export volume during the first five months of FY 1987 totaled 52 million tons, off approximately 6 percent from the 55 million tons exported during the first five months of FY 1986.

The sharpest cumulative year-to-year market declines were concentrated in grains (wheat and corn). However, significant drops were also registered in exports of vegetable oils, tallow, and peanuts. These decreases are a reflection of both value and volume declines from year-earlier levels.

However, agricultural exports, other than grains, were up \$466 million (6 percent) during October-February 1987 over October-February 1986. The biggest gainers were raw cotton, furskins, beef, soybean meal, poultry products, tree nuts, fruit, vegetables, and sugar and sweeteners.

U.S. agricultural imports for October-February 1987 totaled \$8.3 billion, down 4 percent from the October-February 1986 total. Imports for February 1987 totaled \$1.7 billion, slightly above February 1986. The overall net surplus of agricultural trade during October-February 1987 amounted to \$3.6 billion, down from a net surplus of \$4.1 billion during the same period a year earlier.

U.S. Agricultural Trade
(Billion Dollars)

	-----FISCAL YEAR-----			-----OCT-FEB-----		
	1986 Actual	1987 Forecast	Percent Change	1986 Actual	1987 Actual	Percent Change
Exports	26.3	26.0	-1	12.8	11.9	-7
Imports	20.9	20.0	-4	8.7	8.3	-4
Trade Balance	5.4	6.0	---	4.1	3.6	---

EXPORT ENHANCEMENT INITIATIVES

The status of USDA's Export Enhancement Program as of April 16, 1987, was as follows in metric tons:

ANNOUNCED INITIATIVES	DATE ANNOUNCED	QUANTITY/RESULTS	
66. Turkey rice	Apr. 3, 1987	70,000	
65. Colombia barley malt	Apr. 3, 1987	15,000	
64. Iraq table eggs	Feb. 20, '87	189 million eggs	
63. Canary Islands poultry	Feb. 9, '87	5,000	
62. Nigeria wheat	Jan. 28, '87	500,000	
61. China wheat	Jan. 26, '87	1,000,000	COMPLETE
60. Iraq wheat	Jan. 16, '87	800,000	Sold 440,000
59. Switzerland barley or sorghum	Jan. 16, '87	250,000	Sold 9,000
58. Poland wheat	Jan. 7, '87	500,000	COMPLETE
57. Poland barley or sorghum	Dec. 31, '86	200,000	Sold 137,000
56. Romania wheat	Dec. 23, '86	250,000	
55. Iraq poultry	Dec. 22, '86	60,000	Sold 25,000
54. Dominican Republic table eggs	Dec. 9, '86	25 million eggs	Sold 11.1 million eggs
53. Zanzibar wheat flour	Dec. 9, '86	20,000	
52. Tunisia barley	Dec. 1, '86	150,000	
51. Gulf countries (Bahrain, Kuwait, Oman, Qatar, United Arab Emirates) dairy cattle	Oct. 30, '86	1,500 head	Sold 740

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

50.	West Africa (Cameroon Cote d'Ivoire, Ghana, Togo) wheat	Oct. 30, '86	345,000	Sold 79,500
49.	Dominican Republic poultry	Oct. 29, '86	1,500	Sold 1,133
48.	Philippines barley malt	Oct. 20, '86	60,000	Sold 25,000
47.	Cameroon wheat flour	Oct. 14, '86	20,000	
46.	Romania barley	Sept. 24, '86	200,000	Sold 125,000
45.	Venezuela barley malt	Sept. 4, '86	100,000	
44.	Cyprus barley	Aug. 26, '86	150,000	Sold 108,000
43.	Canary Islands wheat	Aug. 8, '86	100,000	
42.	Egypt semolina	Aug. 6, '86	30,000	Sold 23,000
41.	Soviet Union wheat	Aug. 1, '86	4,000,000	EXPIRED
40.	Canary Is. dairy cattle	July 28, '86	3,000 head	COMPLETE
39.	Hong Kong table eggs	July 28, '86	44 million eggs	Sold 22.0 million eggs
38.	Senegal wheat	July 17, '86	100,000	COMPLETE
37.	India vegetable oil	July 8, '86	25,000	COMPLETE
36.	Jordan barley	June 17, '86	60,000	
35.	Israel barley	June 17, '86	200,000	Sold 66,682
34.	Tunisia dairy cattle	May 29, '86	4,000 head	COMPLETE
33.	Algeria dairy cattle	May 29, '86	5,000 head	COMPLETE
32.	Sri Lanka wheat	May 16, '86	125,000	COMPLETE
		March 5, '87	95,000	Sold 85,000
31.	Saudi Arabia barley	May 7, '86	500,000	COMPLETE
		Aug. 6, '86	250,000	COMPLETE
		Sept. 16, '86	300,000	COMPLETE
		Oct. 8, '86	200,000	COMPLETE (201,000)
		Jan. 5, '87	1,250,000	COMPLETE
30.	Algeria barley	Apr. 17, '86	500,000	
29.	Morocco dairy cattle	Apr. 16, '86	4,000 head	COMPLETE
28.	Turkey dairy cattle	Apr. 16, '86	5,000 head	COMPLETE
27.	Egypt dairy cattle	Apr. 16, '86	6,000 head	COMPLETE
		Sept. 12, '86	10,000 head	Sold 2,801
26.	Yemen poultry feed	Apr. 14, '86	150,000	Sold 7,000
25.	Yugoslavia wheat	Apr. 10, '86	200,000	COMPLETE
		June 24, '86	200,000	COMPLETE
		Oct. 7, '86	500,000	Sold 93,050
24.	Indonesia dairy cattle	Apr. 9, '86	7,500 head	COMPLETE
23.	Syria wheat	Apr. 8, '86	700,000	CANCELLED
22.	Benin wheat	Apr. 7, '86	45,000	Sold 30,000
21.	Algeria table eggs	Apr. 4, '86	500 million	eggs
20.	Iraq dairy cattle	Apr. 4, '86	6,500 head	Sold 770
19.	Jordan wheat	Mar. 19, '86	75,000	COMPLETE
		June 20, '86	75,000	COMPLETE
		Dec. 31, '86	225,000	COMPLETE

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

18. Tunisia wheat	Mar. 18, '86	300,000	COMPLETE
	Aug. 22, '86	800,000	Sold 250,000
17. Algeria wheat flour	Feb. 25, '86	100,000	
16. Algeria semolina	Feb. 11, '86	250,000	Sold 30,000
15. Philippines wheat	Jan. 7, '86	150,000	COMPLETE (152,400)
14. Zaire wheat	Dec. 27, '85	35,000	COMPLETE
	May 15, '86	45,000	COMPLETE
	Oct. 17, '86	40,000	Sold 25,000
13. Nigeria barley malt	Dec. 10, '85	100,000	Sold 23,700
12. Iraq wheat flour	Dec. 9, '85	150,000	COMPLETE
	Jan. 7, '87	175,000	Sold 25,000
11. Egypt poultry	Nov. 26, '85	8,000	COMPLETE
	Mar. 21, '86	15,000	COMPLETE
	June 18, '86	5,000	COMPLETE
	July 8, '86	15,000	COMPLETE
	Dec. 19, '86	25,000	Sold 12,500
	Feb. 27, '87	6,000	
10. Zaire wheat flour	Nov. 18, '85	64,000	COMPLETE
	May 15, '86	30,000	Sold 15,000
9. Philippines wheat flour	Nov. 15, '85	100,000	Sold 50,000
8. Jordan rice	Nov. 8, '85	40,000	Sold 38,700
	Jan. 13, '87	60,000	
7. Turkey wheat	Oct. 16, '85	500,000	COMPLETE (506,600)
	May 8, '86	500,000	Sold 248,000
6. Morocco wheat	Sept. 30, '85	1,500,000	COMPLETE
	Dec. 9, '86	790,000	Sold 260,000
5. Yemen wheat	Sept. 6, '85	100,000	COMPLETE
	Jan. 26, '87	100,000	Sold 25,000
4. Yemen wheat flour	Aug. 20, '85	50,000	COMPLETE
	Apr. 14, '86	100,000	COMPLETE
3. Egypt wheat	July 26, '85	500,000	COMPLETE
	Oct. 30, '85	500,000	COMPLETE (512,500)
	June 24, '86	500,000	COMPLETE
	July 29, '86	52,000	Sold 29,000
	Oct. 8, '86	1,000,000	Sold 406,000
2. Egypt wheat flour	July 2, '85	600,000	COMPLETE
	Aug. 6, '86	600,000	
1. Algeria wheat (ex durum)	June 4, '85	1,000,000	COMPLETE
wheat (ex durum)	Apr. 10, '86	1,000,000	Sold 354,000
durum	Nov. 10, '86	300,000	COMPLETE
durum	Mar. 16, '87	300,000	Sold 182,000

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EXPORT ENHANCEMENT PROGRAM SUMMARY

Status as of April 16, 1987

Announced to Date 23,178,680 tons grains and products (grain equivalent)
758 million table eggs
140,500 tons frozen poultry
52,500 head dairy cattle
25,000 tons vegetable oil

Sold to Date 10,458,059 tons wheat
1,446,876 tons flour (grain equivalent)
2,840,682 tons barley
72,610 tons semolina (grain equivalent)
64,932 tons barley malt (grain equivalent)
106,000 tons sorghum
38,700 tons rice
7,000 tons poultry feed
25,000 tons vegetable oil
81,633 tons frozen poultry
38,636 head dairy cattle
32,562,000 table eggs

Total Sales Value: \$1,448.9 million
Estimated Bonus Book Value: \$961.3 million
Market Value of Awards: \$671.4 million

TARGETED EXPORT PROMOTION PROGRAM

No announcements were made under USDA's Targeted Export Assistance Program this week.

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Selected International Prices

Item	: April 21, 1987	: Change from	: A year
	:	: a week ago	: ago
ROTTERDAM PRICES 1/	\$ per MT	\$ per bu.	\$ per MT
Wheat:			\$ per MT
Canadian No. 1 CWRS-13.5%.	148.50	4.04	+2.50
U.S. No. 2 DNS/NS: 14%....	138.00	3.76	+1.00
U.S. No. 2 S.R.W.10/	129.50	3.51	-0.50
No. 3 H.A.D.....	161.00	4.38	+1.00
Canadian No. 1 A: Durum...	162.00	4.41	-3.00
Feed grains:			
U.S. No. 3 Yellow Corn....	89.50	2.27	+0.50
Soybeans and meal:			
U.S. No. 2 Yellow.....11/	207.45	5.65	-1.05
Brazil 47/48% Soya Pellets	192.00	--	+3.50
U.S. 44% Soybean Meal.....	191.00	--	+4.50
U.S. FARM PRICES 3/			
Wheat.....	93.95	2.53	-0.73
Barley.....	70.73	1.54	-1.38
Corn.....	61.02	1.55	+1.57
Sorghum.....	58.42	2.65 2/	+0.22
Broilers.....	1,026.02	--	-18.96
EC IMPORT LEVIES			
Wheat 5/.....	230.40	6.27	+2.20
Barley.....	224.25	4.88	+3.30
Corn.....	209.70	5.33	-3.00
Sorghum.....	219.75	5.58	+0.10
Broilers 4/ 6/ 8/.....	--	--	--
EC INTERVENTION PRICES 7/ 9/			
Common wheat(feed quality)	223.45	6.08	+1.85
Bread wheat (min. quality)	233.85	6.36	+2.25
Maize.....	233.85	5.94	+2.25
Barley and all other feed grains, excluding maize.	223.45	--	+1.85
Broilers 4/ 6/.....	--	--	--
EC EXPORT RESTITUTIONS (subsidies)			
Wheat	N.A.	--	--
Barley.....	155.10	3.38	--
Broilers 4/ 6/ 8/.....	--	--	--

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Five-day moving average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. 9/ Changes may be due partly to exchange rate fluctuations and/or ECU payments. 10/ June Shipment. 11/ October. N.A.=None authorized. N.Q.=Not quoted. Note: Basis May delivery.

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